



CARROLL  
UNIVERSITY

## Carroll University Example Bequest Language

The following includes examples of suggested **bequest** wording to benefit Carroll University. Each individual situation is unique, and, therefore, these examples include only some of the possible gift opportunities. We strongly encourage you to share your final will provision with the Carroll University Office of Institutional Advancement to ensure your wishes will be properly followed and recognized.

To assist you with your plans, the Office of Institutional Advancement can provide sample language for the specific program or area you wish to support. This confidential service is available to you without obligation.

If you would like to designate your gift for a specific purpose, school, program, or newly endowed fund at Carroll University, please contact us to learn how you can utilize a gift agreement to clearly document your gift intentions and its future use.

To discuss your gift intentions, for additional information, and/or to request specialized language for a will or trust, please contact Katie Cyrus, Assistant Director of Gift Planning, at [giftplanning@carrollu.edu](mailto:giftplanning@carrollu.edu) or 262.951.3014.

### UNRESTRICTED BEQUEST SAMPLE LANGUAGE

I hereby give, devise, and bequeath to Carroll University (Tax ID #39-0806325) a nonprofit, nonstock, Wisconsin corporation with its principal office in Waukesha, Wisconsin, [ \_\_\_\_\_ percent (%) of the rest, residue, and remainder of my estate; OR \_\_\_\_\_ dollars (\$); OR specific asset] to be used in an area of **greatest need** at Carroll University. If at the time the gift is received an

amended document with another designation or use for the gift is noted with Carroll University, I request that Carroll University utilize my gift in accordance with the terms of the most recent document on file at the University.

### **RESTRICTED BEQUEST SAMPLE LANGUAGE**

I hereby give, devise, and bequeath to Carroll University (Tax ID #39-0806325) a nonprofit, nonstock, Wisconsin corporation with its principal office in Waukesha, Wisconsin, [ \_\_\_\_\_ percent (%) of the rest, residue, and remainder of my estate; OR \_\_\_\_\_ dollars (\$); OR specific asset] to be used for \_\_\_\_\_ at Carroll University. Should the restriction or condition on my gift become unlawful, impracticable, wasteful, impossible to achieve, become an impairment on the management or investment of the gift, or become an impairment on my intent, the University may modify the gift restrictions or conditions to align most fully to my original intent. If at the time the gift is received an amended document with another designation or use for the gift is noted with Carroll University, I request that Carroll University utilize my gift in accordance with the terms of the most recent document on file at the University.

### **Contact Information**

Katie Cyrus

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